

Legal Assistance Tool for Year 2019

Legal Assistance AAA Self-Assessment Tool

I. AREA AGENCY ON AGING INFORMATION

Region: _____

AAA Name: _____

C.O.G. Executive Dir.: _____

AAA Director: _____

Name of Person to Contact if Questions about this Self-Assessment Tool:

II. INFO OF PERSON COMPLETING THE SELF-ASSESSMENT TOOL

Signature: _____

Printed Name: _____

Title: _____ Date: _____

Email: _____ Phone: _____

III. DAAS CONTACT INFORMATION

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Legal Assistance Tool for Year 2019

IV. LEGAL ASSISTANCE PROVIDER INFORMATION

A. Provide the following information for the region you serve:

Legal Service Provider Name: _____
Contact Person: _____
Phone # for Contact Person: _____
Email Address for Contact Person: _____

Complete the following about the listed legal service provider above:

Counties Served:	Funding per County	Unit Rate	Last Monitored Date
ex: Durham	\$14,148.23	\$50.00/hour	3/8/2018

** Please use additional space to list each legal service provider in your region and each county in your region **

B. If a county in your region does not have a legal service provider, explain:

C. If a county in your region has a legal service provider and the Division of Aging & Adult Services' reimbursement system, ARMS, shows zero claims for reimbursement in that county, from July 1, 2018 until June 30, 2019, please explain below.

D. Does your legal service provider respond to requests from the AAA in a timely fashion?

ANSWER: _____

E. Is there an area of law the legal service provider should expand in your region due to demand?
If yes, explain:

*Note-This question is asking about new types of services not already offered by the legal service provider, not if the demand is greater than funding in your region for legal services.

Legal Assistance Tool for Year 2019

F. Is the AAA notified if an attorney who offers services under Title III-B funding is reprimanded, barred or censured by the appropriate State Bar?

ANSWER: _____

G. Is the AAA aware of the legal service provider's policies regarding client conflicts of interest?

ANSWER: _____

V. LEGAL ASSISTANCE SERVICES

A. Number of Persons 60/60+ Served

1. How many unduplicated persons 60/60+ received legal assistance funding by the Title III-B program during the fiscal year starting July 1, 2018, and ending June 30, 2019, in your region?

ANSWER: _____

B. Units of Service

1. How many units of service were provided during the fiscal year starting July 1, 2018, and ending June 30, 2019?

ANSWER: _____

2. Explain your AAA's process for verifying units of service when monitoring?

a. What documents do you review to verify units of service?

b. How does the AAA monitor and legal service provider preserve attorney/client privilege while also verifying units of service?

Legal Assistance Tool for Year 2019

3. Do you or your provider limit the number of units per client?

a. If yes:

How?

Why?

4. Can the legal service provider bill for travel time? Y/N: _____

a. If yes, upon what terms and conditions:

5. Can the legal service provider bill for outreach/educational activities? Y/N: _____

a. If yes, upon what terms and conditions:

C. Outreach

1. Do your legal service providers conduct presentations or seminars? Y/N: _____

If yes, do you require the providers to supply you with an outreach plan for the year with scheduled events and agenda information? Please explain or attach the schedule in lieu of explaining.

Legal Assistance Tool for Year 2019

a. If the legal service provider(s) conduct(s) presentations or seminars, please provide a list of topics given, to what type of audience, and general date for each presentation. A schedule can be attached in lieu of explaining.

D. Funding

1. How much funding did the AAA allocate for legal assistance in your region for the fiscal year starting July 1, 2018, and ending June 30, 2019?

ANSWER: _____

2. Was the amount allocated to legal services at least two (2)% or higher than the regional amount?

Y/N: _____

3. Were all allocated funds used for legal assistance? Y/N: _____

a. If yes, approximately how many weeks after the start of the fiscal year, July 1, 2018, did it take before legal funding ran out?

ANSWER: _____

4. Does your AAA allocate any funding other than Title III-B legal assistance funds for legal services?

a. If yes, please explain.

E. Targeting 60/60+ persons in the greatest need

1. How do legal service providers serve:

a. low income 60+ persons:

Legal Assistance Tool for Year 2019

b. racial minorities:

c. 60/60+ persons with limited English proficiency

d. 60/60+ persons residing in rural areas

d. isolated 60/60+ persons

VI. DOCUMENTS

- A. Thank you for your responses. Please electronically mail or forward via United States postal mail, a copy of this self-assessment tool in addition to copies of your most recent monitoring report for all legal service provider(s) in your region. Please note electronic mail is the preferred method of receipt but not required.

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